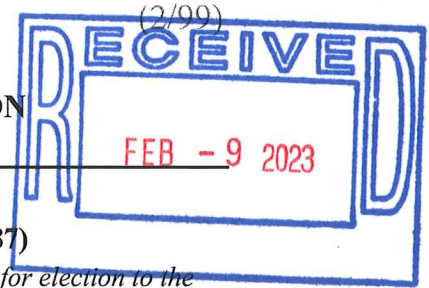


KENTUCKY LEGISLATIVE ETHICS COMMISSION



STATEMENT OF FINANCIAL DISCLOSURE (KRS 6.787)

To be filed by: All members of the General Assembly, all candidates and nominees for election to the General Assembly, and major management personnel in the legislative branch of state government.

Please Include The Following Information For The Preceding Calendar Year:

Name: Nancy Tate

Business address: 702 Capital Avenue Frankfort Kentucky 40601

Business telephone: 5025648100

Home address: 115 Garrett Road Brandenburg Kentucky 40108

Title of public position, or office sought: Kentucky House of Representatives

Other occupations of filer: None

Occupation of spouse: Long Term Disability

NOTE: The Following Sections Do Not Require Disclosure Of Specific Dollar Amounts.

Positions held by filer in any business, partnership, corporation for profit, or corporation not for profit from which the filer receives compensation, and the name of the business, partnership, or corporation:

Retired on January 3, 2020 from Business Continuity Manager - UPS

Positions held by filer's spouse in any business, partnership, corporation for profit, or corporation not for profit from which the filer's spouse receives compensation, and the name of the business, partnership, or corporation:

On Long Term Disability from Monument Chemical

Names and addresses of all businesses, investments, or securities in which the filer, filer's spouse, or filer's minor children had at any time during the reporting year an interest of \$10,000 at fair market value, or 5% ownership interest or more:

UPS Stock (self)

401K (self)

UPS, 1400 N. Hurstbourne Lane, Louisville, KY 40223 (self)

Monument Chemical (spouse), 2450 Olin Road, Brandenburg, KY 40108

Sources and form of gross income of the filer (list sources by name):

Retirement from UPS

Dividends from UPS stock

Dividends from 401K

Kentucky State Representative, District 27

Optavia Coach

In the process of settling my father, Frank Joseph Jones's, estate. Estimated completion is July 2023. Known long term source: Edward D. Jones

Sources and form of gross income of the filer's spouse (list sources by name):

Disability Insurance from Monument Chemical / Social Security Disability Insurance

Positions of a fiduciary nature in a business:

Board of Directors - Meade Breck Right To Life

Board of Directors - Kentucky Right To Life

Board of Directors - Ciara's House

Board of Directors - Meade County Christian School

Board of Directors - Meade County Catholic Education Foundation

A designation as commercial, residential, or rural, and the location of all real property other than the filer's primary residence, in which there is an interest of \$10,000 or more held by the filer, filer's spouse, or filer's minor children:

Rural Land In Meade County (joint)

Rural Land In Breckinridge County (self)

Rural Land In Breckinridge County (spouse)

Rural Land In Breckinridge County (joint)

Sources of gifts of money or property with a retail value of more than \$200 to the filer or the filer's immediate family, except those from a member of the filer's family. (Family means spouse, parent, sibling, child, mother-in-law, father-in-law, son-in-law, daughter-in-law, grandparent, or grandchild. Immediate family means unemancipated child residing in an individual's household, spouse, or a person claimed by the filer's spouse as a dependent for tax purposes.):

None

The name of any creditor owed more than \$10,000 **except** debts arising from the purchase of consumer goods. (Goods used or bought for use primarily for personal, family, or household purposes):

Truist (BB&T)

Farm Credit Mid-America

Meade County Bank

The name of any legislative agent who is:

1. A member of the filer's immediate family;
2. A partner of the filer, or a partner of a member of the filer's immediate family;
3. An officer or director of the filer's employer;
4. An employer of the filer or an employer of a member of the filer's immediate family;

5. A business associate of the filer or a business associate of a member of the filer's immediate family

None

The names of the filer's clients who are legislative agents or employers:

None

If you have held a professional license during the filing period, has a properly licensed partner of yours engaged in the practice of cases or other matters which you are prohibited from practicing under KRS 6.744? : Yes No ☒ Not Applicable

If yes, list the names of the clients represented and list the agencies before which the partner made an appearance. The filer need not identify which client was represented before a specific agency:

Clients

Not Applicable

State Agency

Not Applicable

NOTICES

1. Upon receipt by the Commission, a statement of financial disclosure shall be a public record available for copying.
2. Any person who fails to file a statement of financial disclosure or who fails to remedy a deficiency identified by the Commission in a timely manner may be fined an amount not to exceed \$100 per day up to a maximum total fine of \$1000.
3. Any person who files a statement of financial interests which they know to contain false information, or to omit required information, shall be guilty of a class A misdemeanor.

2-9-2023
Date

Nancy J. Tate
Filer

Send completed statements to: The Kentucky Legislative Ethics Commission
22 Mill Creek Park
Frankfort, Kentucky 40601